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Communication Server Security Setup Guide

CommWorks Ready

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ABOUT THIS GUIDE

This chapter covers security issues over the network, assigning rights and permissions to users.

If release notes are shipped with your product and the information there differs from the information in this guide, follow the instructions in the release notes.

Most user guides and release notes are available in Adobe Acrobat Reader Portable Document Format (PDF) or HTML on the 3Com World Wide Web site:

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Conventions

Table 1 and Table 2 list conventions that are used throughout this guide.

Table 1 Notice Icons

Icon	Notice Type	Description
	Information note	Information that describes important features or instructions
	Caution	Information that alerts you to potential loss of data or potential damage to an application, system, or device

Convention	Description
`Screen displays`	This typeface represents information as it appears on the screen.
`Syntax`	The word "syntax" means that you must evaluate the syntax provided and then supply the appropriate values for the placeholders that appear in angle brackets. Example: To enable RIPIP, use the following syntax: `SETDefault !<port> -RIPIP CONTrol = Listen` In this example, you must supply a port number for <port>.
`Commands`	The word "command" means that you must enter the command exactly as shown and then press Return or Enter. Commands appear in bold. Example: To remove the IP address, enter the following command: **`SETDefault !0 -IP NETaddr = 0.0.0.0`**
The words "enter" and "type"	When you see the word "enter" in this guide, you must type something, and then press Return or Enter. Do not press Return or Enter when an instruction simply says "type."

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Convention	Description
Keyboard key names	If you must press two or more keys simultaneously, the key names are linked with a plus sign (+). Example: Press Ctrl+Alt+Del
Words in *italics*	Italics are used to: ■ Emphasize a point. ■ Denote a new term at the place where it is defined in the text. ■ Identify menu names, menu commands, and software button names. Examples: From the *Help* menu, select *Contents*. Click *OK*.

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1 INTRODUCING SECURITY

This chapter explains how security works and what functions it performs. It also provides reference information on **pre-defined user groups**, all **permissions** and **permission definitions**.

Introduction

The organization of this guide follows the concepts and steps required to set up security. Follow the steps in this guide exactly to achieve the best results and ensure the fewest problems.

After setting up the server and adding users, use the security module. Security works with the existing trustee hierarchy (server supervisors, account supervisors, administrators, managers and users) and allows you to specify permissions for individuals (users), accounts and groups.

The Nature of Objects

Documents are objects that are stored in the fax server that may be accessed by users for faxing. Cover pages, telephone lists and attachments are objects. User profiles and modems are also objects.

Permissions and Objects

Permissions determine who can do what to each object.

The security permissions for server supervisors are fixed. You cannot change the permissions nor delete the user group. This ensures that the server always has someone that can work with users, **Server Setup** and **Security** permissions. When the server supervisor creates a new user, the user is assigned to an account under an account manager by the server supervisor. Once assigned to an account, the server supervisor assigns some control over the user to the account supervisor.

Functions of Security

Security allows you to:

- Create accounts for users and objects (such as modems, cover pages and phonebooks)
- Create Groups of users and objects
- Set the permissions owned by users, user accounts and user groups, to access specific objects and object groups.

Some examples of permissions to access a modem include:

- Monitor the status of the modem
- Reset the modem
- Pause/Resume modem activity

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A complete description of all possible permissions appears in the "Security Objects and Permissions" section later in this chapter.

A permission can be:

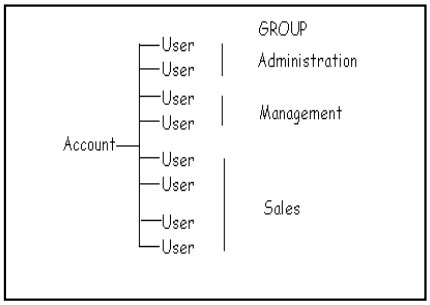
- Granted—you can do the action
- Denied—you cannot do the action
- Inherited—you can or cannot do the action based on the permissions defined for your group
- Irrevocable—you can do the action and the permission cannot be denied.

To learn more about the types of permissions, see "Icon List—Permission Icons" on page 1-4.

Accounts

An "account" does for CommWorks IP Fax Solutions roughly what a "domain" does for Windows NT. Here are some attributes of accounts:

- Each account contains one or more users
- Every user belongs to one account
- Users have more rights to things that belong to their own account, than they do to things that belong to other accounts. For example, a user might have read-access to a public phonebook created by another user who belongs to the same account, but would have no access to phonebooks created by users who belong to a different account.



- Each account has its own administrator. Administrators have all-powerful privileges to things (e.g. end-users and fax-jobs) which belong to their own account, but no privileges to things that belong to another account.

Groups

Setting up and managing security is easier when objects and users are grouped. Create groups of users to assign similar permissions. For example, you might have a Sales User group that has permission to use the same fax port device.

Create groups of objects to assign users similar permissions to use tham. For example, a subset of modems called **Sales** might be accessable only by members of the Sales User group.

Positive and Negative Security Permissions

Grant permission to do something (positive) or deny permission to do something (negative). The following is an example of a negative permission:

> Assume that **All Fax Users** have permission to use and monitor fax port number 2. **Sales** users are to use this port, but are not to monitor it. In this

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case, simply remove permission from the **Sales User** group to deny them access to monitoring feature of fax port 2. All other user groups, except those belonging to the sub-group **Sales User**, can still monitor the modem.

This illustrates that user groups with similar permissions can be modified, allowing greater control.

Security Glossary

Irrevocable Permission—A permission that is granted to users because they belong to a pre-defined group with permissions that cannot be changed. The server supervisor, account supervisors, CommWorks IP Fax Solutions manager, CommWorks IP Fax user and Assistant groups all have irrevocable permissions.

Default Permission—A permission that is granted to users because they belong to a pre-defined group with the permissions. The difference between default permissions and irrevocable permissions is that you can change Default Permissions.

Owned By Self—Any object that users can create or is owned by them has a group labeled "Owned By Self". This group gives the creator or owner of an object more permissions for objects they own than for objects that are owned by other people. Some objects that users create are faxes, attachments and cover pages. Some objects users own are received faxes and their user profile.

Member—Each group of users or objects can have members. Members are individuals or sub-groups that belong to a group.

List—Users with the list permission can see that the object or user exists, although they may not be able to use it. Generally, the user or User group must have this permission before they are granted another permission for the object. For example, a user that has the Use Attachment permission without the List Attachment permission will never see the attachment to select it; therefore, the user cannot 'use' the attachment.

Account #— Every user belongs to one account. Accounts are named using account numbers (Account #'s). The **Account #** to which each user belongs is displayed in the "User Properties" dialog. Properties for these Account #'s are also

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set up here. There are two states of an Account # in reference to a user. The Account # is either Active or Forwarded.

Table 1-1 Icon List—Object Icons

Icon	Name	Icon	Name
	Server		Modems
	Attachments		Phonebooks
	Cover Pages		User Profiles
	Account #'s		Server Setup
	Fax Jobs		Users
	Folders		

Table 1-2 Icon List—Permission Icons

Icon	Name	Icon	Name
	Granted permission that was inherited.		Denied permission that was inherited.
	Granted permission that was explicitly given.		Denied permission that was explicitly refused.
	Granted permission that cannot be denied.		

Adding Members to Pre-Defined User Groups

There are six pre-defined user groups; server supervisors, account supervisors, managers, Fax Administrators, and CommWorks IP Fax users.

Use the Security module to add, authenticate and define new users.

Assistants also have irrevocable permissions, however, since the assistant's permissions depend on another user's permissions the assistant user level is not listed as a pre-defined User group. Assistants have the same permissions to fax jobs as the user they assist.

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If you are satisfied with the pre-defined User groups and their permissions, you may not need to use this security module at all (except to add new users). For more information on the permissions for pre-defined groups, see the following section, "Pre-Defined User Groups".

Pre-Defined User Groups

There are six pre-defined User groups with default permissions. You cannot remove any of the pre-defined groups or change the irrevocable permissions. However, you can change the default permissions for any pre-defined User group.

The only users without default permissions (they only have irrevocable permissions) are server supervisors, account supervisors and Assistants.

Assistants can perform the same actions on fax jobs as the person they assist. They are not included in security because their permissions are completely dependent on the person they assist.

Pre-defined User groups provide the structure for the security module. This section discusses the pre-defined User groups and explains their default and irrevocable permissions.

If you want to add and remove members for the pre-defined User groups, you can do so using the User Properties dialog.

In addition to the pre-defined groups and their permissions, you can add individual members to sub-groups and set up permissions for the sub-groups to meet your company specific requirements. For more information on sub-groups, see Chapter View/Edit Server Setup—Display and change the Server Setup dialog and all its options. later in this guide.

Irrevocable Permissions

Members that belong to the following pre-defined groups have certain irrevocable permissions:

- Server Supervisors
- Account Supervisors
- CommWorks IP Fax Managers
- CommWorks IP Fax Users
- Assistants

Irrevocable permissions cannot be changed.

Groups

Server Supervisors Members of this group have **all** irrevocable permissions for all objects, including:

- Add Users
- Control server set up
- Set up security

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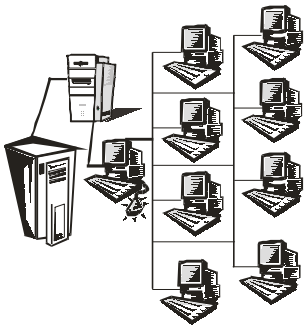
Ser└er super└isors cannot create fax jobs unless they also belong the Fax Users group.

Account Supervisors Account supervisors are created to provide added security for individuals who need it. Defined properties of accounts might prevent server supervisors (who create users) from viewing faxes, which are created by users in a specific account.



The account structure supports three scenarios:

1. Non-ISP and non-VFN (identical to previous versions of CommWorks IP Fax)

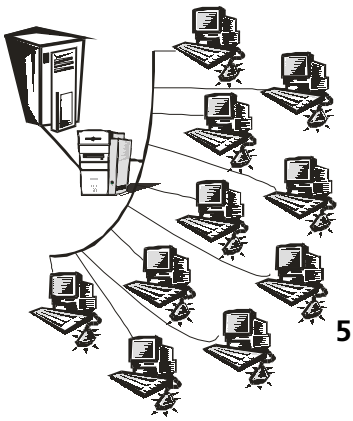
   One company owns the fax server, and all users of the server are employees of that company. In this case, you might have just one account (i.e. the default "Account #1"). All users belong to the one account and the server supervisor might be the same person as the account administrator.

2. One ISP with several corporate clients

   In this new scenario, the server is owned by an ISP. The ISP has several clients. Each client is a corporation with several users.

3. The server supervisor is an employee of the ISP and is able to create new accounts (i.e. add new corporate clients to the ISP's server). The server supervisor need not be an administrator in these new accounts. Therefore, the server supervisor would not need to view faxes owned by the various corporate client-accounts.

4. The account administrator for each account would be an employee of each corporate client. The account administrator would therefore be able to administer faxes, which are owned by that corporation, and able to administer the users which are employees of that corporation. Each account administrator has no authority over things, which belong to other accounts, nor authority over the global Server Setup settings. These would be controlled by the server supervisor.



   Each account administrator would also be responsible for adding new users to their own accounts. It is important that this job of adding extra users to the account should belong to the account administrator (an employee of the corporate client), and not to the server supervisor (an employee of the ISP).

5. One ISP with many individual (home/end-User) clients

   This scenario is similar to 2), except that each account contains only end-user.

CommWorks IP Fax Managers Members of this group have all irrevocable permissions for all objects that are owned by the users that they manage, including:

- Fax jobs
- Attachments
- Cover pages
- Phonebooks
- Folders
- User profile definition

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CommWorks IP Fax Users Members of this group have irrevocable permissions to create fax jobs. You **must** belong to this group to create fax jobs.

Assistants Members of this group can do the same actions to fax jobs as the person they assist.

Default Object Permissions

This section lists the permissions, by object, which all users have by default. For more information on what each permission means, see Permission Definitions by Object later in this chapter.

All Attachments All users can List, View and Use attachments. Users have all permissions to their own attachments (All Attachments Owned By Self).

Although network attachments are controlled here, attachments sa└ed into network subfolders are controlled by the Folder Permissions.

All Cover Pages All users can List, View and Use cover pages. Users have all permissions to their own cover pages (All Cover Pages Owned By Self).

All Fax Jobs All users can have their faxes paused for review by their manager when defined on the server (Authorize Send). Users have all permissions to their own fax jobs (All Fax Jobs Owned By Self).

All Folders All users can list the folder as well as view faxes, add faxes and delete faxes from a folder. Users have all permissions to their own folders (All Folders Owned By Self).

Attachments that are sa└ed into network subfolders are controlled here instead of using Attachment Permissions.

All Phonebooks All users can list and send a fax to a phonebook (either the entire phonebook or a phonebook recipient). All users can also view, edit, add and delete phonebook recipients. Users have all permissions to their own phonebooks (All Phonebooks Owned By Self).

All User Profiles Users have no default permissions to All user Profiles. However, users can list and view their own user profile.

Server Setup Users have no default permissions to Server Setup.

All 'Objects' Owned By Self For each object, that users can create or own there is a pre-defined object group:

- All Attachments Owned by 'Self'
- All Cover Pages Owned by 'Self'
- All Fax Jobs Owned by 'Self'
- All Folders Owned by 'Self'
- All Phonebooks Owned by 'Self'

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- User Profile Owned by 'Self'

This group allows the creator of an object additional permissions for it. You can change these permissions as needed. For more information on the default permissions users have for objects Owned By Self, see the previous section. For an example of how to change permissions on an Owned by Self group, see Chapter 3 Security Permission Examples.

Security Objects and Permissions

The following lists each server object and the permissions you can set up for it. For each object type, you can have both groups and individual objects with their own security permissions.

You can use this list when planning the type of security your company requires.

Permission Dependencies

Some permissions depend on other granted permissions before they can work. If you have a permission to use, edit or remove something, you require the appropriate List Permission before you can do so. The List Permission allows you to see that the object exists. For example, if you can Use all cover pages, but you do not have the List Permission for cover pages, there will never be a cover page visible to select.

Another dependency appears when you want to view or change a dialog that is accessed from the User Properties dialog, such as User Preferences. You cannot access the User Properties dialog without the granted permission to View.

Permission Definitions by Object

This section lists actions that can be taken on objects and provides a brief definition. Permission is required before the action can be carried out.

Attachment Permissions

Attachment Permissions control attachments saved to the network folder. If the Attachment is saved to a network subfolder, you must use the Folder Permissions to control access.

Delete Attachment—Remove an Attachment from a network location using the Attachments window.

List Attachment—See the Attachment in the list of existing attachments from the Attachments window and Fax Send dialog. Other Attachment Permissions are only useful when you have the List Permission.

Use Attachment—Send the Attachment with outbound faxes on the Fax Send dialog.

View Attachment—View the Attachment contents from the Attachments window.

Cover Page Permissions Delete Cover Page—Remove a cover page from the server location using the Fax Send dialog.

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List Cover Page—See that the cover page exists in the list of cover pages using the Fax Send dialog. Other Cover Page Permissions are only useful when you have the List Permission.

Use Cover Page—Send the Cover Page with outbound faxes from the Fax Send dialog.

View Cover Page—View the Cover Page contents using the Cover Page Editor.

Fax Job Permissions

Authorize Send—Faxes are automatically paused by the server if the **Activate Manager Send** option is enabled on the Server Dialing dialog and the user has a manager defined in the **Manager** field on the **User Properties** dialog.

Copy to Another User—Send another user a copy of a received fax using the **Move to User** dialog.

Delete Fax Job—Remove a fax from the **Send Log** or **Receive Log**.

List Fax Jobs—See that the fax exists from the Send Log or Receive Log. Other Fax Job Permissions are only useful when you have the List Permission.

Move to Another User—Move the fax to another user by changing the fax's owner or routing a received fax to another user.

Pause Fax Job—Pause a fax from the Send Log.

Purge Fax Job—Permanently remove faxes marked as deleted from the Send Log or Receive Log.

Resubmit—Change and resend a fax from the Send Log or Receive Log.

Unpause (Resume) Fax Job—Resume a fax that is currently paused from the Send Log.

View All Pages—View all pages of a fax in the Fax Image Viewer.

View First Page—View the first page of a fax in the Fax Image Viewer.

Folder Permissions

Folder Permissions also affect attachments when the attachment is saved into a network subfolder. Only attachments saved into the main network folder are controlled by Attachment Permissions.

Add To Folder—Add a fax to a folder in the Send Log or Receive Log window.

Delete Entire Folder—Remove a folder and its contents from the Folder menu.

Delete From Folder—Remove a fax from a folder from the Folder menu.

List Folder—See that the folder exists from the Send or Receive Logs. Other Folder Permissions are only useful when you have the List Permission.

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Rename Folder—Change the folder's name from the Folder Properties dialog.

View From Folder—View a fax from the folder in the Fax Image Viewer.

Phonebook Permissions

Add to Phonebook—Add a recipient to a phonebook or phonebook group on the Phonebooks window.

Delete Entire Phonebook—Remove the phonebook and all its contents from the Phonebook window. This permission also allows you to Pack and Reindex the phonebook, purging all recipient's marked as deleted and allowing the program to read the phonebook faster.

Delete Phonebook Item—Remove a recipient from the phonebook or phonebook group from the Phonebook window.

Edit Contents—Change the recipient information for the phonebook or phonebook group using the Edit Recipient dialog.

List Phonebook—See that the phonebook exists in the Phonebook window and Fax Send dialog. Other Phonebook Permissions are only useful when you have the List Permission.

Rename Phonebook—Change the name of the phonebook or phonebook group in the Phonebook window.

Send To Phonebook—Use the phonebook, phonebook group or individual phonebook recipients when addressing faxes using the Fax Send dialog.

View Contents—View the detailed recipient information from the phonebook or phonebook group using the Edit Recipient dialog.

User Profile Permissions

Delete User—Remove a user from the server from the Security Setup window.

Edit Pre-Defined Groups—Change someone's user level, meaning to add or remove the user to or from the following pre-defined groups:

- Server Supervisor
- Account Supervisor
- Fax Manager
- Fax Administrator
- Fax User

This permission also allows you to change a user's manager and define an Assistant.

Edit User Preferences—Change the preferences for the user from the User Preferences dialog.

Edit User Profile—Change the fields on the User Properties dialog for the user.

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Edit User's Phonebook Entry—Change the phonebook entry information for the user from the user's Phonebook Entry dialog.

List User—See that the user exists on the Authorized Users dialog. Other user permissions are only useful when you have the List Permission.

View User Profile—View the user Properties dialog for the user.

Server Setup

Users with this permission can …

Edit Dialing Restrictions—Change the dialing restrictions for the user from the Dialing Restrictions dialog.

Create New Users—Add new users to the server using the Add Users dialog.

Edit Auto-Routing Table—Create, change and remove entries on the Auto-Routing Table.

Monitor Server Status—View the Fax Server Monitor dialog.

Pause/Resume all Server Modems—Pause and Resume all Fax modems on the server from the Fax Server Monitor dialog.

View/Edit Security Setup—Display and change groups and permissions using the Security module. server supervisors have irrevocable permissions to this option. If users or members of other pre-defined groups want to use this option, they can only change their own permissions or the permissions of those they manage (for Fax managers).

View/Edit Server Setup—Display and change the Server Setup dialog and all its options.

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2 WORKING WITH SECURITY

This chapter explains how to use the security module to create groups and edit permissions.

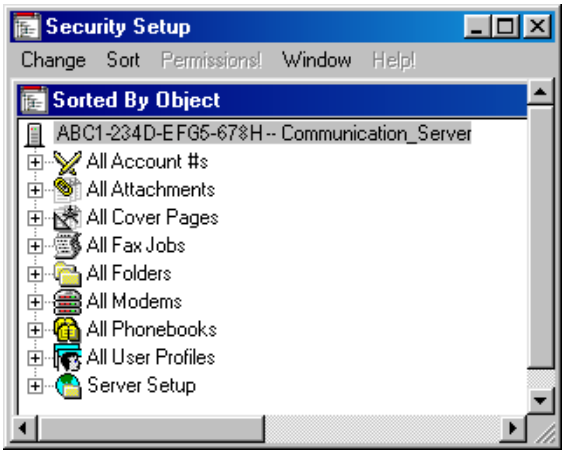
Starting Security

The example below will use the **Server Administrator** button menu to work with security features. Access is also available from the fax client screen.

To start the **Security Setup** window, the fax server must be running.

1. From the Microsoft Start button, click **Programs**.
2. Click **3Com Corporation**.
3. Click **Server Administrator**.
4. Connection to the fax server will begin automatically. If connection screens are configured to **Show**, press **Connect** in the **Server Connection** screen and sign in with administrator permissions.
5. Click **Setup Security** from the main options window. The **Security Setup** screen is displayed.

Figure 2-1 Security Setup Main Screen



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Sorting Security Information

The Security Setup screen has a command bar at the top. This section will address some of the commands found in this area.

The table below describes commands under the **Change** item:

Table 2-1 Change Commands

Command Name	Description
Create New Group	Create a new group from the list of group types. By default, Security is installed with the following types of object groups: ■ Attachments ■ Cover Pages ■ Folders ■ Modems ■ Phonebooks ■ User Profiles ■ Users
Connect to Server	This command will re-establish the link with the fax server. If **Show** connection is enabled, it is possible to connect to a different server by selecting from the list.
Add New User	The **Add Users** screen appears. Once the user name is entered, the **User Properties** screen appears.
Cost Centers	If using billing numbers for invoicing, this command will allow assignment of numbers.
Exit	Save all changes and close the Security Setup screen.

The table below describes commands under the **Sort** item:

Table 2-2 Sort Commands

Command Name	Description
By Users	Use this to view and edit permissions for all user groups and individual users in relation to the objects they are using.
By Objects	Use this to view and edit permissions for all managed object groups (for example, modem groups) and individual objects in relation to the user groups or individual users and how they use these objects. This is the default screen.

The table below describes commands under the **Window** item:

Table 2-3 Window Commands

Command Name	Description
Tile Vertically	When permissions are being changed, an new window is created next to the main screen.
Tile Horizontally	These two commands change the appearance of the screen to facilitate data manipulation by the administrator.

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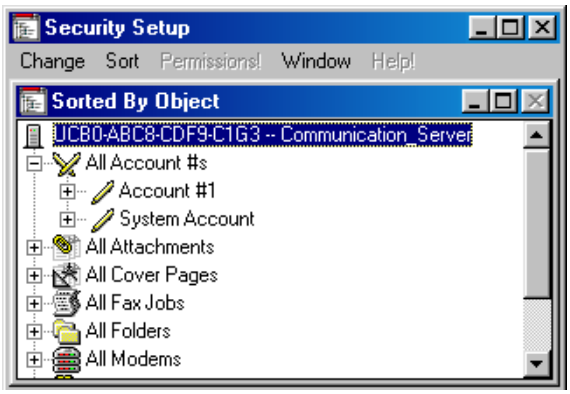
Setting Up Accounts

In a new installation, two default accounts are created automatically: the account names are reserved, and are displayed as "Account #1" and "System Account". These accounts cannot be deleted.

To view the list of accounts, click the plus sign (+) to expand the **All Accounts** folder. Expand the account folders to view a list of account trustees, or users within that account.

Figure 2-2 All Accounts Folder



- "**Account #1**" is the default account, containing all existing users.
- The "**System Account**" is for **User Records** which are created automatically by the server, including accounts on the network that identify remote servers and database files.

Subsequent new accounts can be established, when a new user is created.

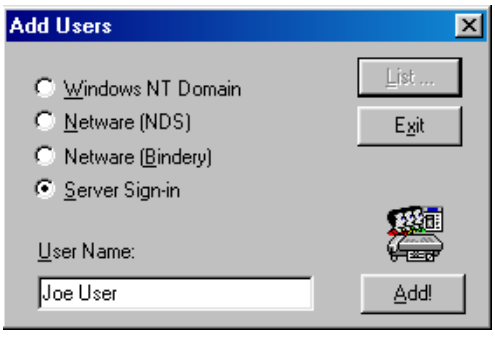
Creating Users and Accounts

A new user is created by the Server Supervisor or the Accounts Supervisor. At the time when the user is created, it is associated with the same Account as its creator, or assigned to a new Account. As the first user in a new Account, this person would be the new Account Supervisor.

To create users manually, follow these steps:

1. Right-click in the white space of the screen.
2. From the menu screen, click **Add New User**. The **Add User** screen appears:

Figure 2-3 Add User



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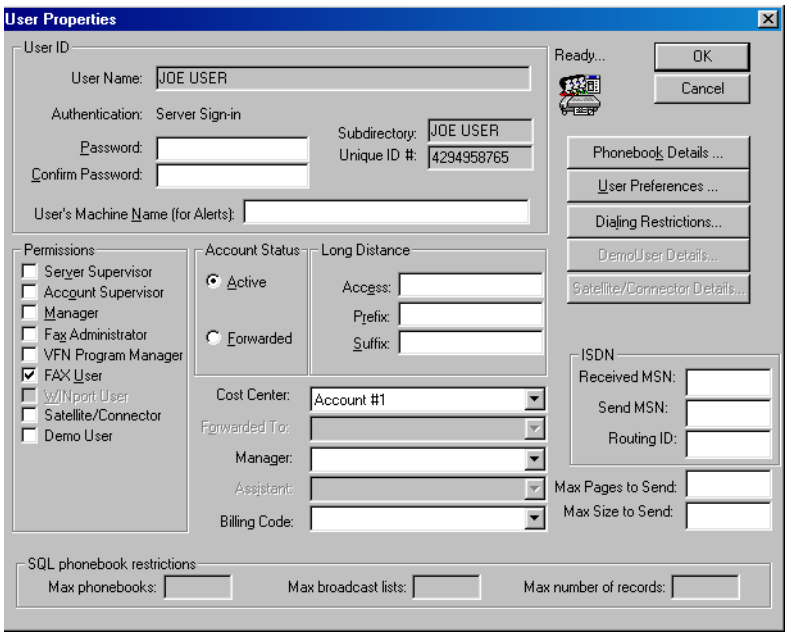
3 Enter the user's name in the field and click **Add**. The **User Properties** screen appears:

Figure 2-4 User Properties



Fields for this screen are described below:

Table 2-4 User Properties Fields

Field Name	Description	Settings
User ID		
User Name	User name appears automatically.	No settings.
Authentication	Set in previous screen.	No settings.
Subdirectory	A folder is created based on the user's name.	No settings.
Unique ID #	A unique number is generated for this user.	No settings.
Password/Confirm	This can be set now or later.	
User's Machine Name	Use this identification if the user will receive alert messages.	
Permissions	Enable as many checkboxes as are appropriate. Even the Server Supervisor must be identified as a Fax User.	Server Supervisor Account Supervisor Manager Fax Administrator Fax User

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Field Name	Description	Settings
Account Status	**Active**: All account rules apply to this user. **Forwarded**: All inbound faxes and activity charges will be forwarded to the account named in the **Forwarded To** field below.	**Active** is the default setting.
Long Distance	Use this optional section if special codes are needed to make long distance calls.	**Access:** An account number or access number may be required by your long distance service provider. **Prefix:** Special commands to use specific hardware devices or to select outbound telephone lines. **Suffix:** Long distance account number identifier for group or user tracking.
Cost Center	Identify the cost center to which the new user belongs. Initially, this drop-down list contains two values: ■ **Account#1** (Server Supervisor belongs) ■ ***<-New Account->***.	By selecting ***<- New Account ->***, a new Cost Center Account is created. The new user is established as the Account Administrator of this new account.
Manager	Identify the new user's manager, if listed.	To make the new user the manager of this account, click the **Manager** checkbox in **Permissions**. The name will appear in the list for subsequent new users.
Billing Code	If billing code is used, it will appear here.	
SQL Phonebook Restrictions	These fields will not be enabled if the server does not use MS SQL server as a database.	
Phonebook Details	Click this button to inspect the User's Phonebook Entry screen. These details will appear in the internal phonebook for all users.	
User Preferences	Click this button to inspect how the user has configured send priorities and notification methods.	
Dialing Restrictions	If this user requires a restriction to be placed on certain telephone numbers, use the screen behind this button.	
ISDN		
Maximums	Establish maximum number of pages or maximum size of file if large fax transmissions need to be restrained.	

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Setting Up Groups

After manually creating users, creating groups provides structure to the security configuration. For example, a separate group may be created for each department so that the use of attachments, phonebooks or port devices is restricted. Setting up groups prepares a default setting for each new user in that group. Exceptions only need individual configuration.

Using groups means that, instead of setting permissions for each user, you can assign group permissions to individual users. By default, users inherit the permissions of all the user groups to which they belong.

By grouping objects, the same permissions for the group of objects can be assigned to users or user groups.

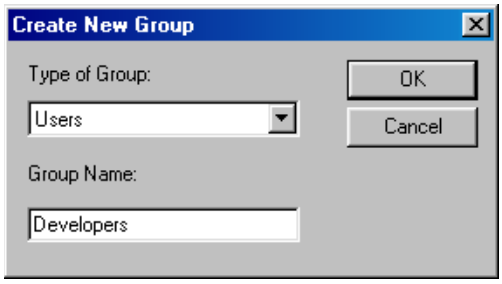
The following procedures will be described below:

- Creating a User-Defined Group
- Managing Groups
- Adding and Deleting Members
- Deleting a User-Defined Group

Creating a User-Defined Group

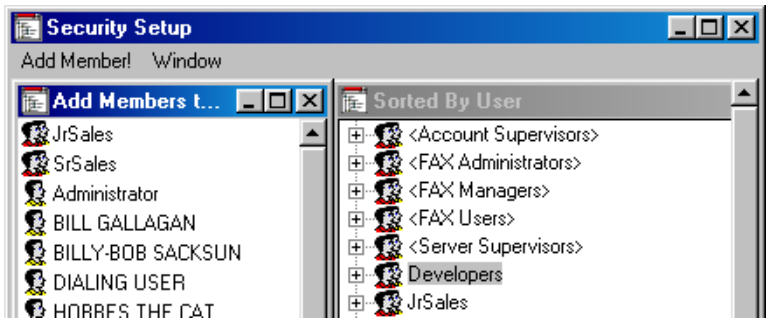
1. From the **Security Setup** window right-click a user or object around which you want create a group.
2. Click **Groups**.
3. Click **Create New Group**. The **Create New Group** dialog appears.

Figure 2-5 Create New Group



4. Select the type of group from the list and name the group. Click **OK** to open the **Add Members to Group** screen:

Figure 2-6 Add Members to Group



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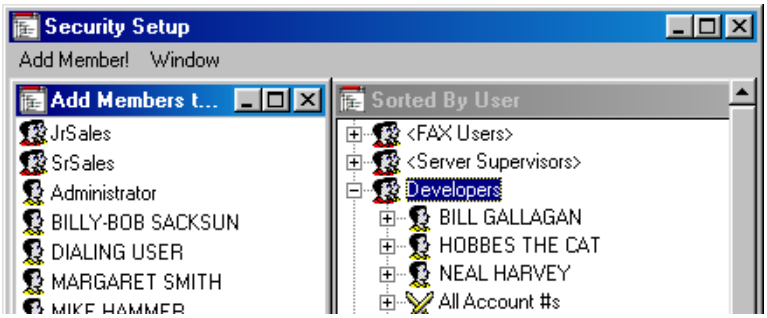
5 The **Add Members** screen opens in a window to the left of the main screen. Select users one-at-a-time or all at once. Click **Add Member!** and the names appear in the expanded groupname folder.

Figure 2-7 Members Added



*If you select an inappropriate group type is selected, **Security** will make an automatic logic correction.*

Managing Groups

At this point, it is important to distinguish the differences between pre-defined groups and user-defined groups.

Table 2-5 Pre-Defined and User-Defined

	Pre-Defined Group	**User-Defined Group**
Add members at any time	yes, with **Auto-Add User**	yes, with **Add Members!**
Delete members at any time	yes	yes
Delete whole group	no	yes

Add Members to an Established User-defined Group

1 From the **Security Setup** dialog, select the group you want to use.

2 From the **Change** menu, select **Add Group Members**. The **Add Members to Group** window appears, as in Figure 2-6, above.

3 Select the users from the list and click **Add Member!** to include them in the list.

Deleting Members

1 In **Security Setup**, select the group you want to use.

2 Double-click the group to view its members and select the member you want to remove.

3 From the **Change** menu, click **Delete Group Member**.

4 The member is removed from the group.

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Deleting a User-defined Group

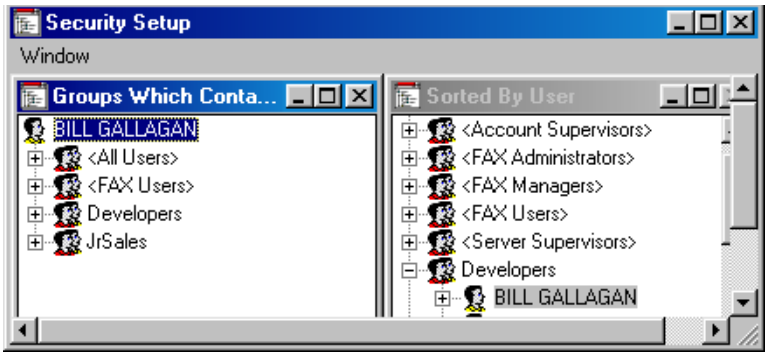
1 In **Security Setup**, select the group you want to remove.
2 From the **Change** menu, click **Delete Group**.
3 The group is removed from the list.

Sub-Groups

Users and objects can belong to more than one group. To view all groups to which the user or object belongs, follow these steps:

1 Open the **Security Setup** window.
2 Select the group or individual you want to use.
3 From the **Change** menu, click **Groups Which Contain ...** The **Groups Which Contain** window opens.

Figure 2-8 Groups Which Contain



4 Make note of all groups selected group or individual belongs.

Setting Up Security Permissions

Add and remove permissions from the **Security Setup** screen. These permissions determine who can do what to each object. Create permissions for individuals or groups of users.

Whether sorted by user or by object, the result is the same. For example, permissions for **Fax Users to All Modems** are identical to permissions for **All Modems for Fax Users**. The permission stays with the user, regardless of where the permission is created.

The following example starts with the users screen. To view and edit permission values, follow these steps:

1 With administrator permissions, open the **Security Setup** window. Select **Sort By Users**.
2 Open a user-defined group folder. In the example, **Developers**.
3 Select an object or object group. In the example, **All Fax Jobs**.
4 Expand that folder to view all sub-groups. Click one of them. In the example **All Fax Jobs Owned by 'Self'** was chosen.

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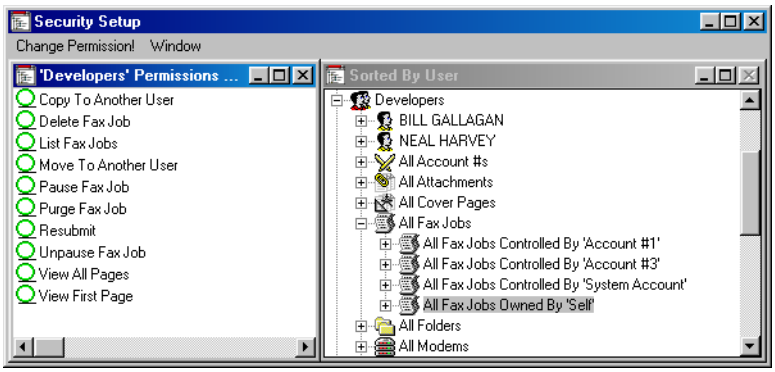
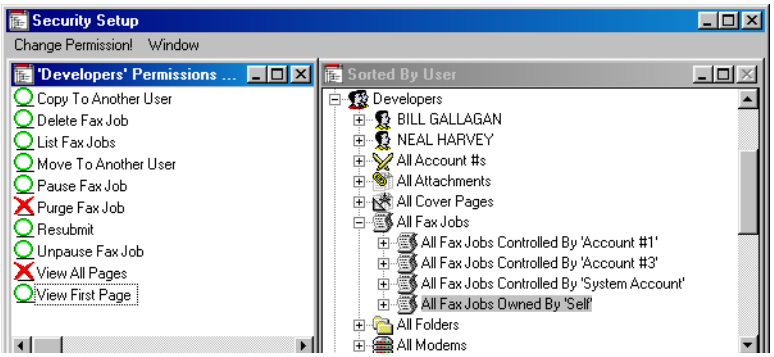
5 On the command bar, click **Permissions**. The **Permissions** window appears:

Figure 2-9 Object Permissions by User Group



6 This screen shows that all inherited permissions have been transferred to all users in this group. Change one or two permissions to perform the next step.

Figure 2-10 Changed Permissions



7 Close the **'Developers' Permissions** screen.

8 Change to **Sort by Object**.

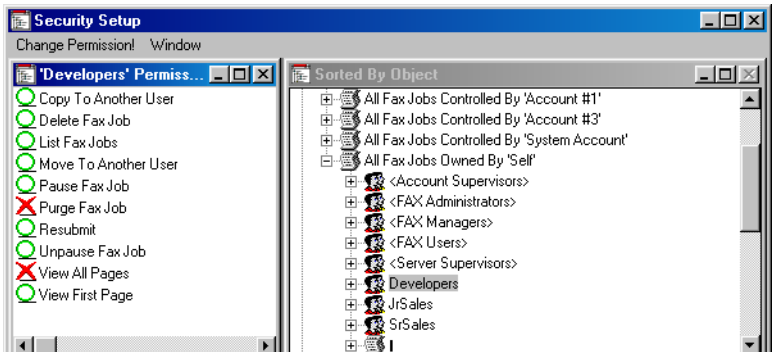
9 Expand the **All Fax Jobs** group.

10 Expand the **All Fax Jobs Owned by 'Self'** group.

11 Click **Developers**.

12 Click **Permissions** to open the **Permissions** screen.

Figure 2-11 User Permissions by Object Group



13 The screen should be the same as the previous screen, when sorted by user.

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Dominant Permission

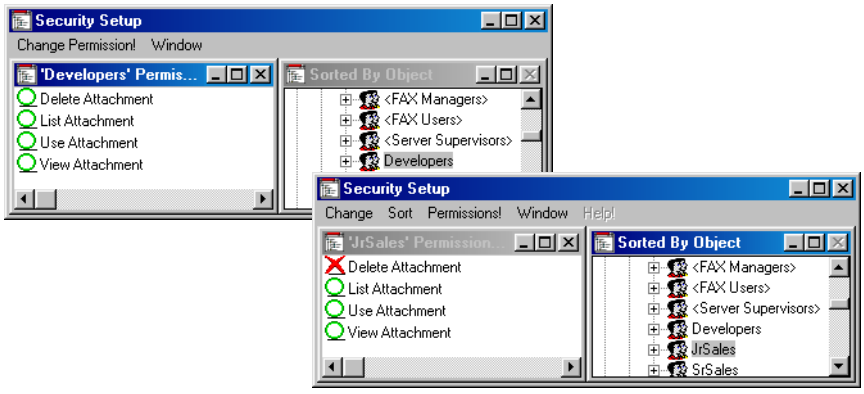
When a user belongs to more than one group with different permissions, or is individually defined for specific objects, which permission is used?

Rule 1. Individual's permissions overrule the permissions for a group. An individual permission overrides a group permission, even if the group permission changes after the individual member was modified.

Rule 2. Explicit permission overrules inherited permission. So, what happens when a user belongs to more than one group, and the permissions of one group grant something while the other denies it?

Here is a fictitious example: Bill Gallagan belongs to the JrSales group and the Developers group. Here are the inherited permissions for All Attachments for both groups:

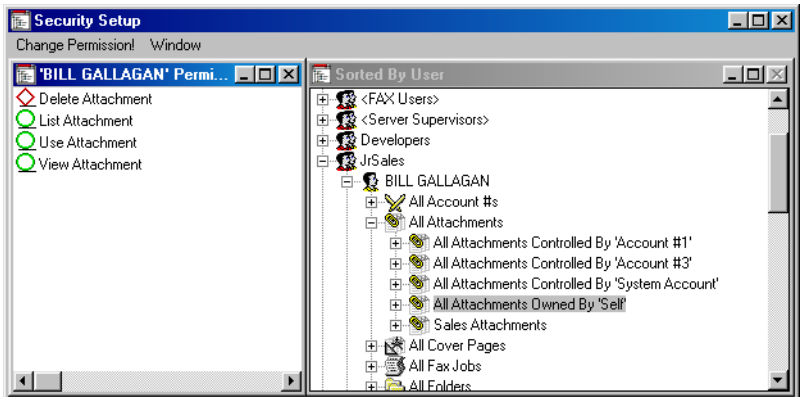
Figure 2-12 'All Attachments' Permissions by User Group



Delete Attachments is permitted in the Developers group and not permitted in the JrSales group.

Here is what the permissions look like for Mr. Gallagan:

Figure 2-13 'All Attachments' Permissions by User



The negative permission is an overriding factor in this case. There are two ways to adjust this:

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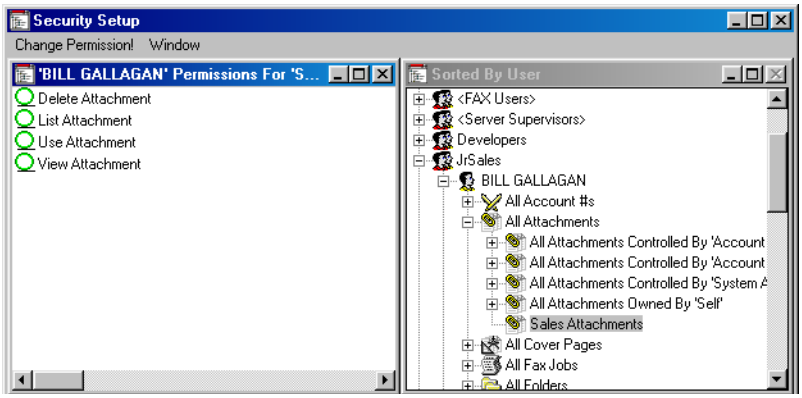
1. Change the permission in this screen. An explicit permission will override a group-inherited permission.

2. Make a specific group for Sales Attachments. These public attachments are accessible by all sales persons. Gallagan has permission to delete in this object group:

Figure 2-14 'All Attachments' Permissions by User



Resetting Security

The entire security module can be re-set back to default settings. Resetting is an all or nothing option, so unless you want to return to the pre-defined settings, you should use the security module to make corrections.

To reset security and return to the pre-defined setup

1. Stop the fax server if it is running.
2. In **Windows Explorer**, open the server directory.
3. One of the server's subdirectories is \SECURITY; delete this subdirectory and all the files it contains.

The next time you run security it will uses the pre-defined setup.

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3 SECURITY PERMISSION EXAMPLES

This chapter shows two example procedures. These samples build on concepts discussed earlier in this guide.

Sample Sales Permissions

This sample uses a group of users called **SrSales** and a group of attachments called **SalesAttachments**. This sample explains how to change the permissions so that only members of the **SrSales** group can use the attachments in the S**ales Attachments** group.

For more information on creating groups, see Chapter 2, "Working With Security" in this guide.

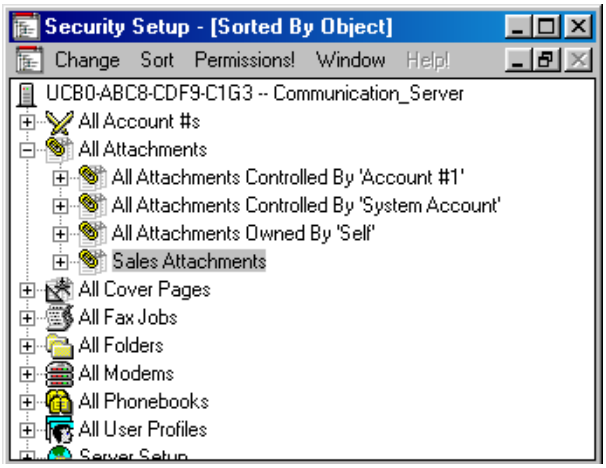
Performing the example requires three steps:

1 Remove the **SalesAttachments** default user permission from the group.

a On the **Server Administrator** button menu, click **Setup Security**. The **Setup Security** screen is displayed.

b If **Sorted by User** is displayed, switch to **Sorted by Objects**.

Figure 3-1 Sort By Objects



c Click the plus sign (+) to the left of **All Attachments** to expand the folder.

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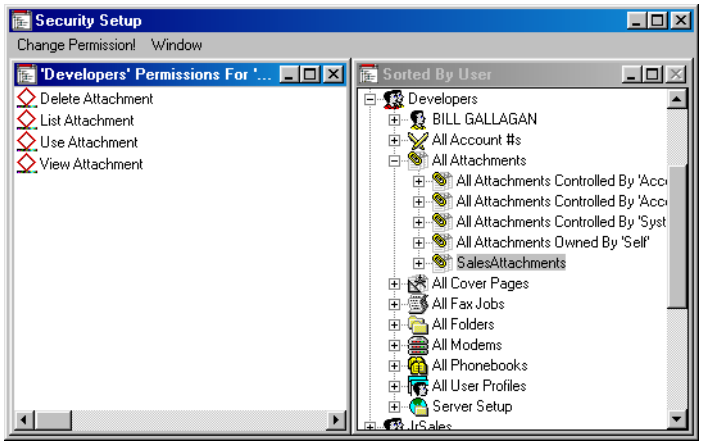
d Click **SalesAttachments** to expand the folder. Click **Permissions!**

Figure 3-2 Default Permissions



e The default permissions for **Sales Attachments** shows that no permissions are granted.

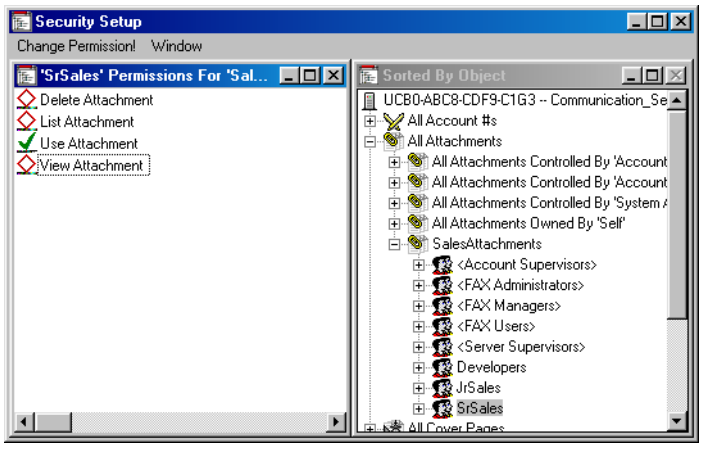
2 Grant the **Developers** group permission to use the attachments in the **SalesAttachments** group.

a From the **Sorted By Objects** window, click **SalesAttachments**.

b Double-click the group to display the users. Select the **SrSales** group.

c Click **Permissions!**. Change the **Use Attachment** permission by clicking it and clicking **Change Permission!**.

Figure 3-3 Permission Changed



d The permission is now explicitly and exclusively granted to **SrSales**.

3 Inspect that permissions are assigned correctly.

a In the **Setup Security** screen, select **Sort by Users**.

b Open the **Developers** folder.

c Open the **All Attachments** folder and click on **SalesAttachments**.

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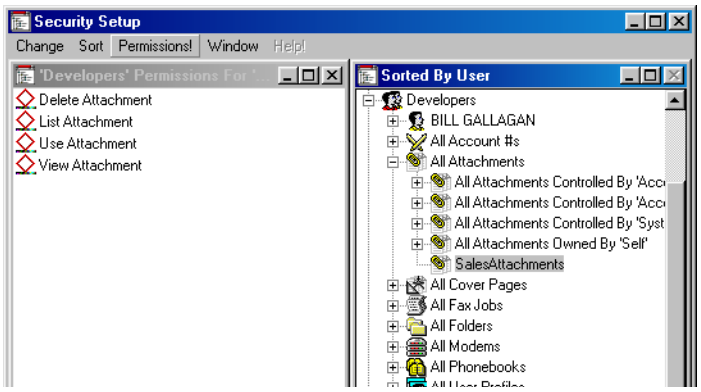
d Click **Permissions!** to see that these attachments cannot be used by this group.

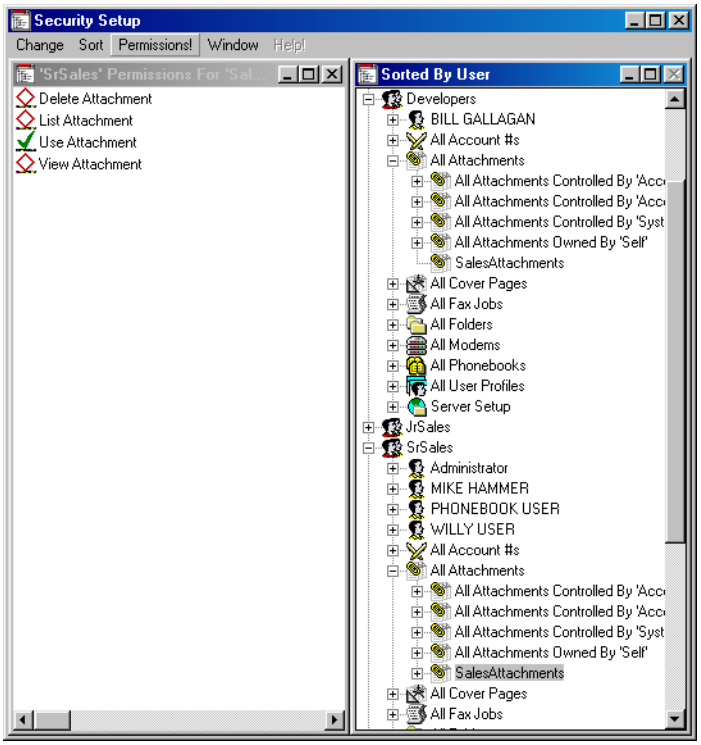
Figure 3-4 Development Permissions



e Open the **SrSales** group.

f Open the **All Attachments** folder and click on **SalesAttachments**.

Figure 3-5 SrSales Permissions



g Click **Permissions!** to see that these attachments can be used by this group.

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To Change Individual Permissions

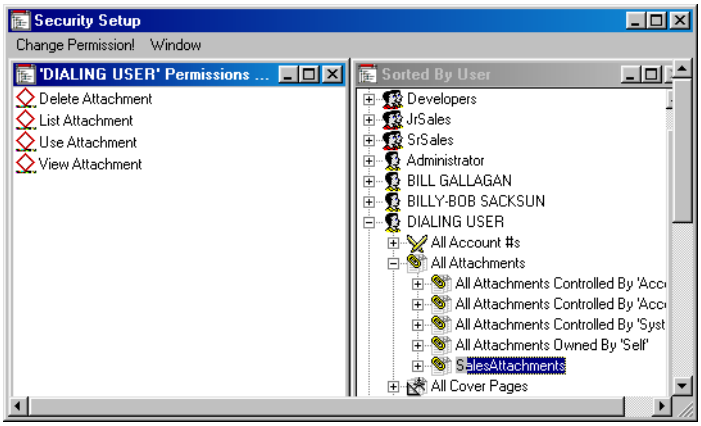
1 In the **Sorted by Users** window, select a user that does not belong to either the **SrSales** group or the **Server Supervisors** pre-defined group. Double-click the user to display the objects.

*Check the groups to which a user belongs by selecting the user and clicking **Groups Which Contain**... from the **Change** menu.*

2 Under **All Attachments**, select **Sales Attachments** and click **Permissions**.

3 Make sure the **Use Attachment** permission is denied.

Figure 3-6 SalesAttachment Permissions



4 Now select a member of the **SrSales** group.

5 Select **SalesAttachments** and click **Permissions** to make sure the **Use Attachment** permission is granted.

6 Click the first user again and go to the **SalesAttachment** item. Click **Permissions!**

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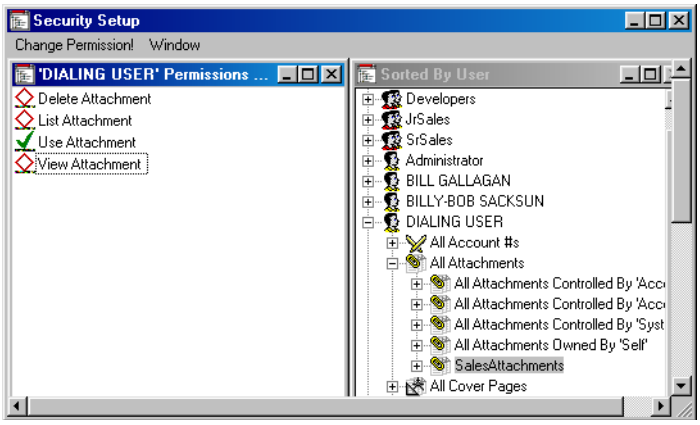
7 Click Change Permissions! to allow this user use of the **SalesAttachments**.

Figure 3-7 SalesAttachment Permissions Changed



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